

Amendments to the Claims

This listing of claims will replace all prior versions and listings of claims in the subject application. No new matter is believed added.

Listing of Claims:

1. (currently amended) A method for managing a corporate restructuring of at least two organizations, the method comprising:

providing a deal selection process comprising identifying acquisition objectives and strategies and searching for one or more best fit target organizations;

providing a transaction execution process;

providing of an integration planning process;

providing of an integration execution process; and

providing of a post-integration assessment process.

~~presenting a user interface including information relating to consolidating customer accounts for at least one of the restructuring organizations; and~~

~~presenting a template in the user interface, the template including a rollout template menu, a pull down window, a list of action items, and a status relating to each action item in the list.~~

2. (canceled)

3. (currently amended) A method comprising:

providing a single logical physically distributed computer-based information system across one or more computer-based information systems of at least two enterprises being combined; and

providing a user interface to allow a user to access the single logical physically computer-based distributed information system to execute one or more pre-merger activities, merger activities, and post-merger activities, ~~the~~ wherein the merger activities ~~including~~ include customer-related integration and resources, the post-merger activities including a post-merger assessment and a measurement of one or more achieved merger synergies.

4. (currently amended) The method of claim 3, wherein the merger activities further comprise:

providing customer-related communications; and

managing and planning customer support activities, wherein the customer support activities ~~including~~ includes addressing one or more customer issues and concerns.

5. (currently amended) The method of Claim 3, wherein the user interfaces are adapted to a role of the user and a phase of the merger, wherein the user role ~~including~~ includes an executive of one or more customer accounts, a security feature of the user interface related to the phase of the merger and a role of the user.

6. (currently amended) A method comprising:

facilitating consolidation of customer-related information for a first organization being merged with a second organization, wherein the customer-related information ~~including~~ includes

customer accounts, and the consolidation ~~including~~ includes matching one or more customer accounts of the organizations; and

facilitating consolidation of customer-related assignments of at least one of the organizations.

7. (original) The method of Claim 6 further comprising: 21

providing an exception list for non-matched customer accounts; and

tracking a status of customer-related engagements.

8. (currently amended) A ~~system for computer program product~~ residing on a computer readable medium having a plurality of instructions stored thereon which, when executed by a processor, cause the processor to perform operations including managing a merger of at least two organizations ~~wherein the system comprises a software process and presenting a user interface adapted to assist customer satisfaction during a merger period, the software process being stored in a medium.~~ by including one or more of: a customer satisfaction statistic, a customer satisfaction rate, a customer satisfaction survey, a movement of a customer satisfaction statistic, and a movement of a customer satisfaction rate.

9. (currently amended) The ~~system~~ computer program product of Claim 8 further comprising instructions for providing:

a first tool adapted to retain one or more ~~customers~~ customer accounts;

a second tool adapted to provide collaborative customer retention planning; and

a third tool to provide targeted and personalized electronic mailing to customers of at least one of the organization.

10. (currently amended) The ~~system~~ computer program product of Claim 9, wherein the second tool is adapted to provide a unified and aligned presentation of customer accounts from one or more merger customer support centers of at least one of the organizations, wherein the presentation ~~including~~ includes customer records.

11. (currently amended) A ~~system for~~ computer program product residing on a computer readable medium having a plurality of instructions stored thereon which, when executed by a processor, cause the processor to perform operations including ~~implementing~~ facilitating the implementation of a merger of at least two organizations, ~~the system including a software product adapted to facilitate~~ for presenting a user interface, and for facilitating sales-related activities of the organizations, the software product including a user interface, wherein the sales-related activities include at least one of sales consolidation, cross selling activities, and customer retention of the organizations.

12. (currently amended) The ~~system~~ computer program product of Claim 11, wherein the user interface presents at least one of a synergy, an expected impact, a realized impact, and a progress of the expected impact, wherein the user interface presents the progress in a graph and at least one of an owner of the synergy, an electronic mailing link, and one or more initiatives related to the synergy.

13. (currently amended) The ~~system~~ computer program product of Claim 11, wherein the user interface presents information for one or more user-identified cross selling opportunities, wherein the information ~~including~~ includes a number of matched customer accounts, a status, and a potential value, wherein the potential value is associated with an external object.

14. (currently amended) The ~~system~~ computer program product of Claim 11, wherein the user interface comprises:

a first panel adapted to address customer-related issues;

a second panel adapted to address sales-related initiatives, wherein the second panel ~~including~~ includes at least one of an approval button, a rejection button, a checklist ~~[[o]]~~ of initiatives, a number of impacted customers, a financial impact, an initiative owner, and an initiative priority level;

a third panel adapted to facilitate customer retention, wherein the third panel ~~including~~ includes a measure of customer retention, one or more retention rates, and a movement of the one or more rates;

a fourth panel adapted to facilitate customer retention, wherein the fourth panel ~~including~~ includes at least one of a customer satisfaction rate, a customer survey, and a movement of the rate, wherein the customer survey comprises one or more external objects; and

a fifth panel adapted to facilitate a search of merger information and to facilitate contacting one or more merger members.

15. (currently amended) A ~~system for managing a merger of at least two organizations~~ comprising a computer program product residing on a computer readable medium having a

plurality of instructions stored thereon which, when executed by a processor, cause the processor to perform operations ~~the system comprising~~ including presenting a graphical user interface adapted to allow a user to consolidate customer accounts for at least one of the organizations, ~~and the graphical user interface further and adapted to~~ match customer accounts from at least two merger organizations.

16. (currently amended) The ~~system~~ computer program product of Claim 15, wherein the graphical user interface comprises a sorted list of customer accounts, a customer account value, a numerical representation of account ranking, information for at least one customer service personnel from each merger organization, information for a customer service personnel assignment relating to at least one account, wherein the customer service personnel assignment ~~including~~ includes a cooperative assignment.

17. (currently amended) The ~~system~~ computer program product of Claim 15, wherein the graphical user interface further comprises information relating non-matched accounts and a clean room tool adapted for at least one stakeholder, wherein the information ~~relating~~ relates to non-matched accounts including a second list of customer accounts.

18. (currently amended) A method for managing a merger of at least two organizations comprising:

presenting a user interface including information relating to consolidating accounts for at least one of the merger organizations, wherein the user interface ~~including~~ includes at least one of a pull down window, a text box, a trigger date, and a response date; and

presenting a template in the user interface, wherein the template ~~including~~ includes at least one of a notification template menu, a list of action items, and an owner relating to each action item in the list.

19. (currently amended) The method of Claim 18, wherein the list of action items comprises at least one of an account executive assignment notification, an account executive personalized communication, a customer communication, a cross selling opportunity, and a retention plan, wherein an action item includes transmission of an email.

20. (original) The method of Claim 18 further comprising facilitating exception handling for at least one of the action items.

21. (currently amended) The method of Claim 18, wherein the user interface further presents at least one of a list and a graph, wherein the graph presents a time period for each listed action.

22. (currently amended) ~~A system for managing a merger of at least two organizations~~ computer program product residing on a computer readable medium having a plurality of instructions which, when executed by a processor, cause the processor to perform operations including comprising a implementing a services unification module, the services unification module including wherein the services unification module comprises a list of one or more user roles, the list of user roles including includes at least one of role for customers, services taskforce members, service representatives, and integration project managers.

23. (currently amended) The ~~system computer program product~~ of Claim 22, wherein the services unification module comprises one or more inputs, wherein the inputs ~~comprising~~ comprise one or more of:

- a list of customer accounts;
- a list of products sold to one or more customers;
- a list of customer-related services;
- a list of customer-related personnel; and
- a list of service providers.

24. (currently amended) The ~~system computer program product~~ of Claim 22, wherein the services unification module further comprises one or more outputs, wherein the outputs ~~comprising~~ comprise one or more of:

- an account services consolidation plan;
- a merged account repository;
- a customer communication;
- a tracking statistic; and
- a customer-satisfaction statistic.

25. (New) The method of claim 1 further comprising presenting a user interface including information relating to consolidating customer accounts for at least one of the restructuring organizations; and presenting a template in the user interface, wherein the template includes a

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rollout template menu, a pull down window, a list of action items, and a status relating to each action item in the list.

26. (New) The method of Claim 1 wherein the list of action items comprises at least one of an account executive assignment notification, an account executive personalized communication, a customer communication, a cross selling opportunity, and a retention plan, wherein an action item comprises transmission of an email.